



TABLE OF PRIORITIES™

I'd used the Center of Management Terms & Practices' CMTP Index to conduct our planning, so I was happy to participate in one of their local workshops on its Table of Priorities. I've rarely seen 30 executives as engaged! It's now a tool we use to help us understand a prospect's real priorities: our sales closing rate took a big step up. – Ed Purcell, President, Vertical Greenwalls

Introduction

Not knowing your organization's priorities is frustrating and expensive. As manager, you must make your team's priorities clear *and* to communicate them clearly. The Table of Priorities™ helps everyone focus fast and learn to speak the same language. It's a great tool to kick off planning. And it's also a powerful sales tool: it uncovers a prospect's true priorities, so you can sell the right thing.

STRUCTURE	INFORMATION
Ethics and the law	Applications
Market position	Internet
Ownership structure	Data and reporting
Governance	Research and analysis
Planning	Communication system
Facilities	Information technology
MARKETING & SALES	HUMAN RESOURCES
Market research	Management
Channels of distribution	Organizational structure

Benefits

The Center's tools minimize omissions, improve communications and foster collaboration. The **Table of Priorities™**:

- Opens a rich conversation about the whole range of management issues
- Gently gets everyone using the same framework and language
- Provides a record that's easy to file or tag in your CRM

Difficulty Easy
Estimated time required 40 minutes
Special skills None

Instructions (See next page for more detail. Have The CMTP Index open)

It's best to start by using the Table one-on-one, rather than with a group. For once, it's better not to prepare too much: the point is to get past assumptions and snap answers.

1. Provide the other person a printed Table and a pen.
2. Ask them to check the issues they think will be important over the next year or two.
3. Say, *That's a lot! Could you put a star by the top three issues?*
4. Then explore those three issues by writing concise questions that fit the space.
5. Promise to provide a tidy version the next day and offer to follow up with resources.

Make It Better!

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

Facilitation ideas

Open: Introductions, small talk, purpose, steps and timing [10 minutes]

“Focus can be a little uncomfortable, but it’s important to get at the tough issues.”

Step 1: Identify all priority issues [10-15 minutes]

“Here’s a pen. Please check the issues in each category that are important over the next year or two. Any order is fine, any number is fine.”

- Be patient to convey they’re in charge
- Don’t pressure them: let them get comfortable sharing concerns
- Eventually, point out if they haven’t checked something in one of the six areas

Step 2: Identify top three priorities [5-10 minutes]

“That’s a lot. You’ve got lots to think about. Could you put a star next to the top three?”

- An item can be a priority either because it’s important or it must get resolved first
- “What might your peers pick as top priorities?”
- “Which issues are critical to your 3-year goals?”

Step 3: Craft the top three questions [10-15 minutes]

“OK. To get clear, it really helps to state the top three issues as questions. These issues are still big: what’s behind each one? This can take some mental work.”

- Together, refer to The CMTP Index to explore the top 3 issues
- Try to stay within the space. Concision helps focus.
- Get open-ended questions
- Avoid:
 - Questions that are too general, e.g., “My question is people!”
 - Questions that are really two or three questions
 - Trying to force a solution or sale with a biased question
- If you feel you’re stuck:
 - “This can take a little work. Tell me more about this issue.”
 - “How else could we phrase this question?”
 - “We’re almost there. Is it OK if I polish this question later?”
- After you’ve drafted all three, read them aloud, “Do those sound right?”

Close [5 minutes]

- “Was this helpful?”
- “I’ll get you a cleaned-up PDF tomorrow and a list of resources in two days.”
- “How would it feel to get these questions answered?”
- “Would the board and the other executives have the same priorities?”
- “Let’s meet in about 10 days to discuss how these helped. How’s your calendar....?”

Joe Jones, CEO of Generic, met with Derrick Van Mell on October 15, 2016. Key issues are in **bold face**; the top three are highlighted **in yellow**.

STRUCTURE

Ethics and the law

Market position

Ownership structure

Governance

Planning

Facilities

INFORMATION

Applications (ERP)

Internet

Data and reporting

Research and analysis

Information technology

Communication system

MARKETING & SALES

Market research

Channels of distribution

Pricing

Marketing communications

Sales management

Customer service

HUMAN RESOURCES

Management

Organizational structure (succession)

Employee relations

Training and development

Compensation

Retention and recruitment

OPERATIONS

Quality

Work process

Production technology

Supply chain

Logistics

Inventory

FINANCE

Financial accounting

Managerial accounting

Budgeting and forecasting

Financing

Cash management

Risk management

Top three questions

1. How can we increase our market share from 8 to 12%?
2. How can we keep our workforce engaged, particularly millennials?
3. How can we make our current ERP project less painful?